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ABSTRACT

A survey was distributed to 27,832 employees of 33 Portland-area businesses in 1987 to determine how many employees had responsibilities to care for elderly persons and what those responsibilities were. A total of 9,573 survey forms were returned and analyzed. The results of the survey showed that nearly one in four employees reported caring for at least one person who is 60 years of age or older. More than one-third of the caregivers also care for children under age 18 living in their homes. Compared with employees with no elder care responsibilities, caregiving employees are, on average, 5 years older, more likely to be women, and more likely to have worked longer for their present employer. Caregiving employees are not very different from employees with no elder care responsibilities with respect to the types of positions held, whether they work full or part time, the shift they work, and their ethnicity. Caregiving tasks ranged from checking with persons on the telephone, visits, providing meals, shopping, or transportation, to complete care. Forty-two percent of the caregivers report that they are the only or main caregiver. Employees who are caregivers to the elderly generally miss more days of work, are interrupted more often at work to deal with family-related matters, and find it more difficult to combine work and family than employees with no elder care responsibilities. The findings document the potentially serious deleterious effects of elder care responsibilities for employees and as a result, their employers, and the need for employer support in this area. (KC)

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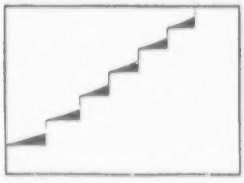
ELDER CARE, EMPLOYEES, AND THE WORKPLACE

FINDINGS FROM A SURVEY OF EMPLOYEES



by

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Thanks are due also to several individuals at the Regional Research Institute for Human Services, including: Arthur Emlen and Paul Koren, for their seminal work examining employees' child care responsibilities, which formed part of the foundation for this study; Wendy Lebow, Darey Shell, and Paul Koren, for managing and assisting in the analysis of the survey data; Patricia Ebert, for her role in contacting employers and eliciting their participation in the survey; Pamela Sievertsen, for designing the logo; and Darey Shell, for her assistance with graphics.

We are particularly grateful to the nearly 9600 employees who completed and returned the survey, many of whom took time to write comments concerning their successes and frustrations in caregiving, the impacts of caregiving on them, their families, and their work, and their suggestions for improvements in service systems and work environments.

Finally, we acknowledge the 33 employers who participated in the survey. Included are small, medium, and large companies and agencies located in the Portland area. These employers, who represent each of the seven major Standard Industrial Classifications, are listed below, alphabetically:

Alpenrose Dairy
Belozer's Poultry Farms, Inc.
City of Portland
Crown Zellerbach
Dove Lewis Veterinary Clinic
Farrell & Associates, Inc.
G.I. Joe's, Inc.
KATU Channel 2
KINK-FM
Mental Health Services West, Inc.
Metropolitan Service District
Multnomah County
NERCO, Inc.
North Pacific Lumber Company
Northwest Natural Gas Company
Omark Industries, Inc.
Pacific First Federal Savings Bank
Pacific Heritage Assurance Company
Pacific Learning Systems, Inc.
Pacific Northwest Bell Telephone Company
Pay Less Drug Stores Northwest, Inc.
Port of Portland
Portland Public Schools
Portland Teachers Credit Union
Safeway Stores, Inc.
Standard Insurance Company
Stoel Rives Boley Fraiser and Wyse
Tektronix, Inc.
The Chas. H. Lilly Company
The Westin Benson
Veterans Administration Medical Center
Willamette Industries, Inc.
Willamette Week

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TABLE OF CONTENTS

	Page
FOCUS OF THE STUDY	2
FINDINGS	2
o How many employees have elder care responsibilities?	2
o Who are the employed caregivers?	2
o Who are the elderly people receiving care?	3
o What are the caregiving situations?	3
o What are the impacts of elder care on employees and the workplace?	4
o What are the impacts of the workplace on caregiving?	5
o What are the needs of employed caregivers?	5
CONCLUSIONS AND RECOMMENDATIONS	6

FOCUS OF THE STUDY

The problem of balancing work and family responsibilities has long been associated with employees who have young children. Yet, America is aging: whereas in 1980, 11% of our population was 65 years of age or over, in the year 2000, 13% of the population is expected to be 65 or over, and in 2050, this percentage is projected to climb to 20%. Furthermore, among the elderly, the oldest, most frail segment is the fastest growing.[1] These are the individuals most likely to need assistance. Studies show that about 80% of the care needed by the elderly is provided by family members, generally women (spouses or daughters).[2] And women are entering the labor force in increasing numbers (51% of adult women are employed outside the home, and 75% of these work full-time).[3]

Although the difficulties faced by employees with respect to finding and managing child care have received considerable attention, the impacts of employees' "elder care" responsibilities--responsibilities for care of elderly family members or friends--have been neglected. To examine these issues, the *Work and Elder Care Project* of the Regional Research Institute for Human Services and the Institute on Aging at Portland State University conducted a survey of employees and their dependent care responsibilities.

In the spring of 1987, surveys were distributed to 27,832 employees of 33 Portland-area businesses and organizations. A total of 9,573 (34%) were returned; this return rate varied dramatically by company, ranging from 10% to 78%. The surveys were distributed through companies' interoffice mail and were returned in envelopes addressed to the Work and Elder Care Project. The employees surveyed were asked:

> *Do you have responsibilities for helping out adult relatives or friends who are ELDERLY or DISABLED? This includes persons who live with you OR who live somewhere else. By "helping out" we mean help with shopping, home maintenance or transportation, checking on them by phone, making arrangements for care, etc.*

Employees who answered "yes" were then asked to list the ages of the adults whom they were helping. For the purposes of this study, employees caring for one or more persons age 60 or over are considered to have "elder care" responsibilities; employees helping adults aged 18-59 are described as having "adult care" responsibilities. The key findings from this survey are presented in the following summary.

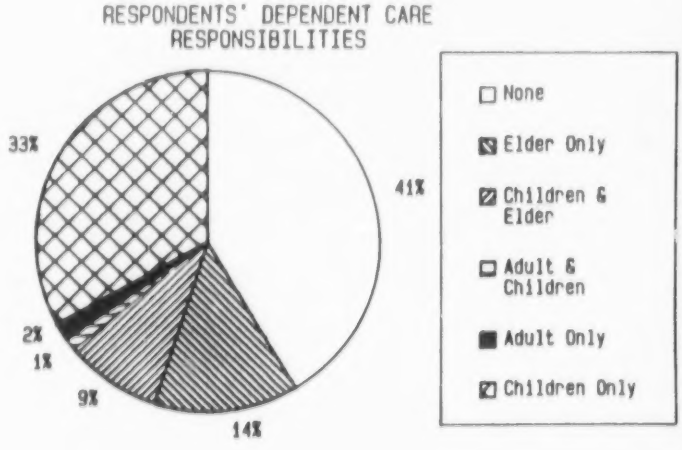
FINDINGS

How many employees have elder care responsibilities?

Of the 9573 employees participating in the survey, **nearly one in four** (23.4%, n=2241) report caring for at least one person who is 60 years of age or over.
Many of these 2241 employed caregivers to the elderly have *multiple* caregiving responsibilities:

- Over one-third of the caregivers (38%) care not only for an elderly person but **also have children** under 18 years of age living in their households.
- 41% of the employees who are caregivers to the elderly are caring for **more than one** elderly person.

The following figure depicts the care responsibilities of employees based on, where applicable, the adult for whom the employee was providing the *most* care. Of the 2241 employees providing elder care, 53 list someone *younger* than 60 (i.e., aged 18-59) as the person for whom they were providing the *most* care; these employees, as well as those employees who *only* had caregiving responsibilities for one or more adults aged 18 through 59, are classified in the figure as providing "adult care." Similarly, the responses of these 53 people are not included in certain of the analyses which follow--those which concern the person being cared for and the specific caregiving situation. For those analyses, the sample size is n=2188.



Who are the employed caregivers?

Compared with employees with no elder care responsibilities, caregiving employees are, on average, five years

older, more likely to be women, and more likely to have worked longer for their present employer.

- o Of the employees reporting caregiving responsibilities for the elderly, 63% are **women** and 37% are **men** (compared with 58% women and 42% men among employees with no elder care responsibilities).

- o Their **average age** is 43.5, although some are as young as 19 and others are as old as 75. (The average age of employees with no elder care responsibilities is 38.5.)

- o Most are **long-time employees**: on average, they have been with their current employer for 12.4 years. (Employees with no elder care responsibilities have been with their current employer for an average of 10 years.)

Caregiving employees are not very different from employees with no elder care responsibilities with respect to the types of positions they hold, whether they work full- or part-time, the shift they work, and their ethnicity.

- o Caregivers work in professional and technical occupations (46%), managerial and administrative positions (19%), as clerical workers (21%) and other occupational categories (14%). (For employees with no elder care responsibilities, these percentages are: 46%, 18%, 20%, and 16%.)

- o Most work full-time (95%), on the day shift (88%). (93% of employees with no elder care responsibilities work full-time, and 87% work days.)

- o 93% are white (as are 93% of the employees with no elder care responsibilities; only 7% are Black, Asian or Pacific Islanders, American Indian or Alaskan Native, or "other").

Who are the elderly people receiving care?

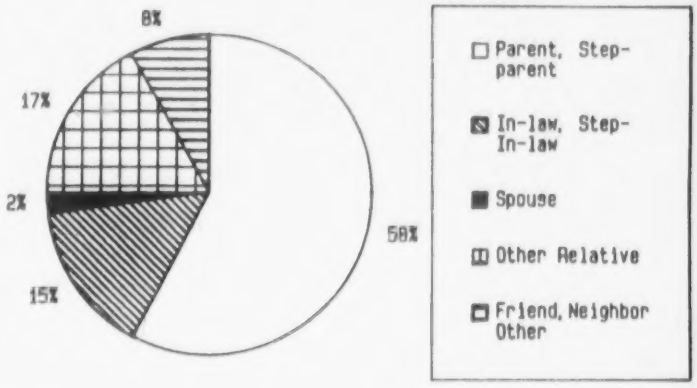
Here we will focus on the 2188 employees who list someone age 60 or over as the adult for whom they are providing the *most* care, and the characteristics of that person.

It is not surprising that most of these employees are caring for a parent, step-parent, or parent-in-law. Yet, in spite of public concern about families being separated in our mobile American society, in almost all cases (88%) the employee lives within 100 miles of the elderly person.

- o Including those who live with the employee (8%), 42% of the elderly persons being cared for live less than 5 miles from the employee caregiver. An additional 35% live between 5 and 24 miles away, and 11% between 25 and 99 miles away; only 12% live 100 miles or more from the employee.

- o As shown below, 73% of the elderly persons are parents, step-parents, or in-laws, only 2% are spouses, 17% are other relatives, and 8% are friends or neighbors.

CARE RECIPIENT'S RELATIONSHIP TO EMPLOYEE



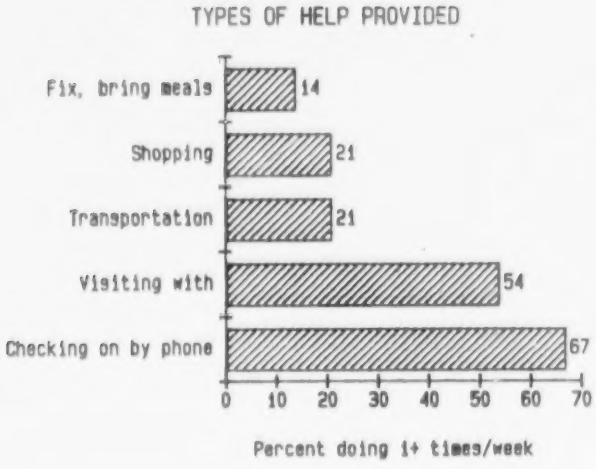
- o 72% of the elderly persons are women, and their average age is 76.9 years.

- o Most (76%) live in their own homes. Only 8% live with the employee (or the employee lives with them), 3% with another relative or friend, and 13% in a nursing home.

What are employees' caregiving situations?

Because we define caregiving broadly, including those who are just helping out a little as well as those who are providing very intense and demanding care, the caregiving situations of employees are quite diverse.

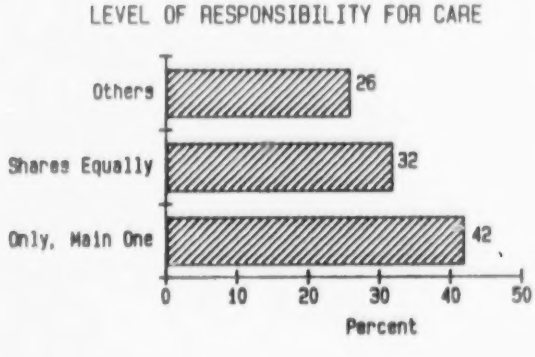
Again focusing on the 2188 employees who listed someone age 60 or over as the adult for whom they were providing the *most* care, the following graph shows the most common **types of help** provided **at least weekly** and the percentages of caregivers doing each. Some caregivers do such tasks **daily**, including one quarter (24%) of the caregivers who check on the person by phone daily and 13% who, on a daily basis, visit with their elderly relative or friend and provide emotional support.



o On average, caregivers have been helping for 6.5 years, although this time ranges from less than one year to 40 years.

o Caregivers provide an average of 6 hours a week of assistance, with some helping as little one hour a week and others helping more than 99 hours a week.

o Employees who are caregivers often share their caregiving tasks with others, generally spouses and siblings. As shown in the following graph, 58% either share equally with someone else (32%) or play a secondary role as caregiver (10%); 42% of the caregivers, however, report that they are the "only" (10%) or the "main" (32%) caregiver.

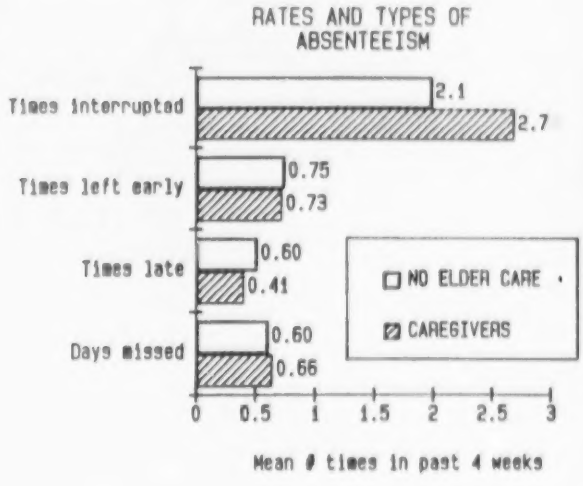


What are the impacts of elder care on employees and the workplace?

Productivity and Effectiveness at Work

Employees who are caregivers to the elderly (n=2241) generally miss more days of work, are interrupted more often at work to deal with family-related matters, and find it more difficult to combine work and family than employees with no elder care responsibilities.

o The following graph, depicting time missed from work in the four weeks prior to the survey, shows that caregivers report missing work and being interrupted at work more often than employees with no elder care responsibilities. Interestingly, employees not involved in elder care were more often late to work.



o When asked how easy or difficult it is to combine work and family, 29% of the caregivers, compared with 24% of employees with no elder care responsibilities, report that it is difficult to combine work and family.

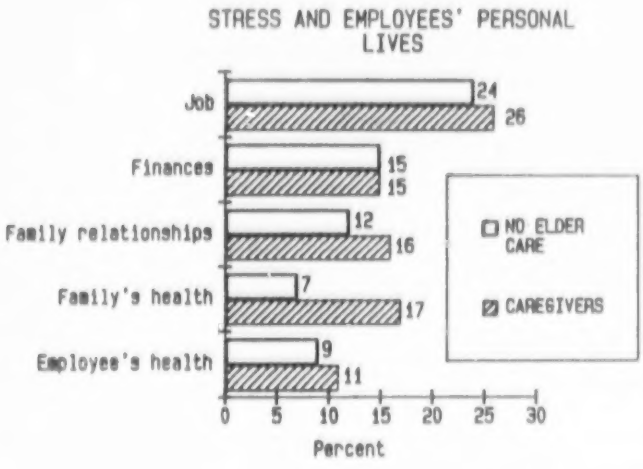
o Only a few caregivers (2.5%) indicate that they have reduced the number of hours they work so that they can provide elder care. They have reduced their workload from one to 30 hours per week, the average reduction being 8 hours per week .

o Among the 2188 caregivers who listed someone age 60 or over as the adult for whom they are providing the *most* care, 8% report that they take time off from work at least once a month to "do something for the person" whom they are helping; an additional 28% say that they take time off from work several times a year specifically to help their elderly family member or friend.

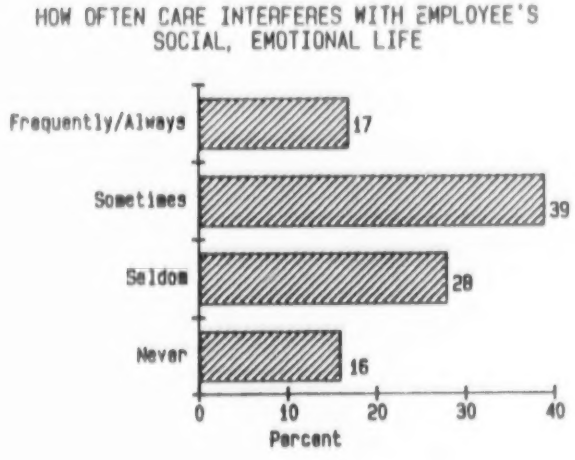
o In addition, 27% of these 2188 caregivers report that they sometimes (24%) or frequently (3%) work less effectively because of being worried or upset about the older person.

Stress and Employees' Personal Lives

When compared with employees who are not caregivers to the elderly, more employees who are caregivers (n=2241) experience "a lot" of stress in all but one of the areas (financial stress) about which they were questioned:



o Among caregivers listing someone age 60 or over as the adult for whom they are providing the *most* care (n=2188), 56% say that their **elder care responsibilities interfere with their social and emotional life** sometimes, frequently, or most or all of the time.



o 37% say they have found it somewhat difficult (25%), difficult (8%), or very difficult (4%) **to help out the older person.**

o Although 58% say they will be **able to continue providing care** for as long as is necessary, 22% say they will be able to continue *only if* they receive more help, 17% say they are not sure, and 3% say they definitely will *not* be able to continue.

What are the impacts of the workplace on caregiving?

Examined here is the extent to which various leave and work schedule policies affect caregivers.

o Among all employees who are caregivers to the elderly (n=2241), most caregivers say that they have at least some **flexibility in their work schedule** to handle family-related matters. Over one-fifth (22%), however, feel that they have no or hardly any flexibility; this is slightly higher than the percentage of employees with no elder care responsibilities who feel they have little or no flexibility in their work schedule (18%).

o When asked about the extent to which caregivers feel **personnel practices in their department** make it easy or difficult to provide elder care, 21% report that these policies make provision of care at somewhat difficult (13%), difficult (5%), or very difficult (3%).

o When caregivers need to take time off work due to their caregiving responsibilities, they say the following are most likely to make this possible:

Time Off Options	*Percent*
Sick leave	7
Flexible hours	15
Emergency leave	11
Leave without pay	6
Vacation, personal leave	30
Do work at home	1
Other	4
Not able to take time off	5
Never take time off for this	23

(Percentages total to over 100 due to rounding.)

It should be noted that the types of leave used by caregivers vary greatly by company as a result of the policies in place at each.

What are the needs of employed caregivers?

Employees who are caregivers to the elderly (n=2241) may use a number of different **services designed to help them.** The following table depicts the percentages of caregivers who report that they currently are using, would use if available *or* if available and needed, or would not use each of five services:

Services	*Currently Use* (%)	*Would Possibly Use* (%)	*Would Not Use* (%)
Information and referral	14	67	19
Discussion group	3	41	56
Pairing with another caregiver	2	31	67
Individual consultation with a professional	6	61	33
Respite care (someone to give the caregiver a break)	3	54	43

With respect to their experiences in finding and managing care for their older relative or friend, caregivers who list someone age 60 or over as the adult whom they are helping the *most* (n=2188) report the following:

- o 34% of the caregivers have mixed feelings (29%), are dissatisfied (3%), or are very **dissatisfied** (2%) **with the arrangements for care** of their elderly relative or friend while they, the caregivers, are at work.

- o 57% of the caregivers say they have found it somewhat difficult (25%), difficult (20%), or very **difficult** (12%) **to find care arrangements** for the elderly person.

- o 42% say they have found it somewhat difficult (25%), difficult (11%), or very **difficult** (6%) to **manage or maintain** these care arrangements.

- o 38% say they have found it somewhat difficult (25%), difficult (9%), or very difficult (4%) to know **where to turn to get help.**

CONCLUSIONS AND RECOMMENDATIONS

The above findings demonstrate clearly that elder care is indeed "a problem" for both employees and employers. Nearly one in four of the employees participating in this survey reported some elder care responsibility. As our population ages, the proportion of employees involved in elder care can be expected to increase concomitantly.

Elder care is a problem for *employers* because elder care responsibilities interfere with employees' work performance with respect to days missed, interruptions at work, and time and effectiveness lost on the job due to worry. In addition, the employees who have elder care responsibilities generally are those who are older, long-time employees.

Elder care is a problem for *employees* not only because of its effects on their work performance. It also appears to be related to higher levels of various types of stress, it interferes with employees' social and emotional lives, and it is difficult to locate help and manage the care. In fact, a large proportion (42%) indicate that some change in their caregiving may be necessary in the future--either they will need additional help, they are not sure whether they will be able to continue providing care, or they know they will not be able to continue their caregiving.

These findings point to a need for the development of effective ways of supporting employees to enable them to both remain in their jobs *and* provide elder care. Caregivers' responses indicate several possible means of assistance. *Coverage of elderly dependents in sick leave policies* could help reduce the need for employees to use much-needed vacation or personal time, to take time off without pay, or to go to work in spite of their elder's needs. Establishment of *flexible work schedules* could be of assistance, as could, for some, development of *dependent care assistance plans* for elderly dependents.

Employees' responses concerning service use and desirability provide a compelling case for employers to consider implementation of certain services. Caregivers indicated particularly strong interest in *information and referral services* and in *individual consultation with a professional*. Both of these services could be provided in the workplace, either by employers themselves or through subcontractual arrangements with third party service providers. Also perceived as desirable by some caregivers was *respite care*. Similarly, *discussion or support groups* and *pairing with another caregiver* were perceived as attractive alternatives by a number of the caregivers.

These findings document the potentially serious deleterious effects of elder care responsibilities for employees and, as a result, their employers. The need for support of employees who are giving care to elderly family members or friends is clear. It is in employers' best interest to play a critical role in providing such support.

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[1] Subcommittee on Human Services, Select Committee on Aging, U.S. House of Representatives. 1987. *Exploding the myths: Caregiving in America*. Comm. Pub. No. 99-611. U.S. Printing Office: Washington, D.C.

[2] Hooyman, N.R. and Lustbader, W. 1986. *Taking care: Supporting older people and their families*. NY: Free Press.

[3] Subcommittee on Human Services, op. cit.